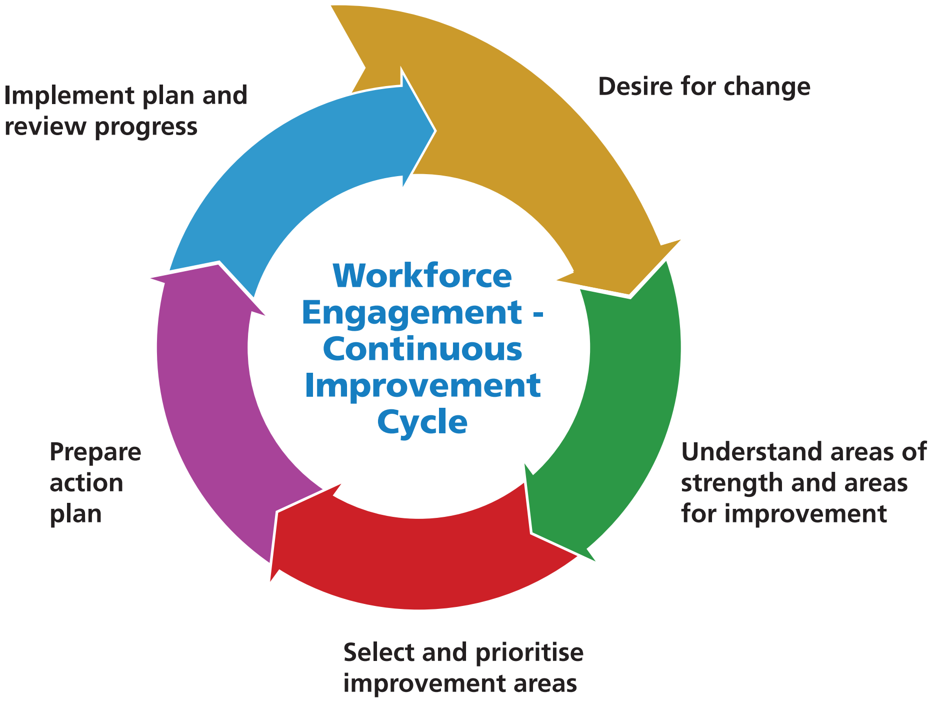
Guide to completing the Workforce Engagement survey at your worksite

To improve Workforce Engagement at any worksite, the areas that are working well and those with opportunities for improvement need to be identified. The Workforce Engagement survey does this by helping everyone on a worksite understand:

- How engaged in safety people are,
- The strengths and areas for improvement in Workforce Engagement, and
- The impact of improvements that have been made (by repeating the survey at future dates to measure any changes).

The survey forms the second part of the Workforce Engagement continuous improvement cycle.



This simple guide outlines the key steps required for a successful survey process.

Important note! Once the survey has been undertaken at a worksite, the workforce should be involved to help identify improvement areas, and to prepare and implement an improvement plan. This is critical, as no survey process will create Workforce Engagement by itself. Surveys are just the beginning of meaningful improvement of Workforce Engagement.

Planning for the survey

In order to plan for the survey, the following actions must be taken;

1. Ensure the senior leadership team shares an understanding of what Workforce Engagement is and supports the running of a Workforce Engagement survey.

   Create a shared understanding of what Workforce Engagement is by reading: "A culture of Workforce Engagement in Safety – self-reflection checklist" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

   Ensure that the senior leadership team knows what the purpose of the survey is - which is to help everyone on the worksite understand:

   - How engaged in safety people are,
   - The strengths and areas for improvement in Workforce Engagement, and
   - The impact of improvements that have been made (by repeating the survey at future dates to measure any changes).

2. Appoint a worksite administrator for the Workforce Engagement Survey Tool (WEST). Worksite Administrators manage both paper-based and online survey processes through the Workforce Engagement Survey Tool (http://west.petrolearn.com).

   Note that each Duty Holder has a Workforce Engagement Champion. These Workforce Engagement Champions have the responsibility of helping worksite administrators on their facilities promote workforce Engagement through the use of the Workforce Engagement Survey and other initiatives. Go to www.stepchangeinsafety.net for more information about the Workforce Engagement Champion role.

3. Decide which groups will be included

   As a general rule of thumb, it is recommended to involve as many groups as possible on a worksite. Consideration should be given to the groups which can be involved fully with the Workforce Engagement improvement cycle – not just the survey itself.

   The total number of people who could respond to the survey needs to be determined.

4. Decide on the timing of the survey

   There are two questions to consider regarding the timing of the survey – when to run it and how long to keep it open for.

   - **When:** Most people would say that there is never a good time to run a survey! Nevertheless, consideration should be given to any planned shutdowns or maintenance that might be affecting the worksite. These activities generally should not stop a survey going ahead, but they may mean that the survey needs to remain open for a longer period of time to ensure all groups on the worksite get the opportunity to participate.

   - **For how long:** For most worksites, the survey should be kept open for at least two months, but no longer than three. However, the actual duration of the survey process will depend on the roster patterns of the number of groups involved, and any of the events discussed above.

5. Decide on how you want to run the survey – online or hard copy

   The key consideration in deciding on how to run the survey is whether or not most people on the workforce have frequent access to an internet-enabled computer. If they do, running the survey online is recommended.

   However, if they don't, hard copy surveys will need to be printed, distributed and collected.

6. Log in to the WEST to go through the registration process and initiate your survey: http://west.petrolearn.com

   Go to www.stepchangeinsafety.net for more information about the WEST.

Preparing for the launch

7. Understand how to communicate about the survey

One of the most useful ways to boost Workforce Engagement at any worksite is by improving communication. See "Engaging Communications – self-reflection checklist" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

It is critical that what Workforce Engagement means to workers on site can be discussed in meaningful terms. Download the following poster to ensure a clear understanding of Workforce Engagement in practical terms. See 'What does Workforce Engagement in Safety Mean to Us' poster" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

There are several key messages to communicate about the survey. These include:

- It is an industry survey, 100% designed to improve safety in the North Sea Oil and Gas industry
- Responses are completely confidential
- The survey is designed to start a dialogue by understanding everyone's views on the worksite
- Workforce Engagement is an on-going focus – not just a tick-the-box exercise that will get filed away

8. Make efforts to engage key groups early in the survey process

Many worksites are able to run better quality survey processes when they engage key groups such as Safety Representatives early in the survey process. This typically involves holding a specific meeting with the key group to discuss the purpose of the survey and how the process works.

Most importantly, the key groups should be asked how they think the feedback and improvement plan development processes could best be undertaken at the worksite.

9. Communicate about the survey

Communicate about the survey using as many communication channels as people. Talk about it within overall briefings, planned and unplanned meetings, one-on-one discussions, and using the available posters.

Ensure that the communication provides opportunities for the workforce to ask questions about the purpose of the survey and the overall survey process.

See the "Workforce Engagement in Safety survey communications pack" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

10. If running the survey in hard copy, print the required number of survey booklets using the unique survey file created from the WEST

Hard copy surveys can be printed locally. However, the printing process must be high-quality to ensure that the unique survey file number is clear on each survey form. This is critical to ensure that the appropriate responses are included in the results for individual worksites.

It is usually a good idea to print a number of additional surveys (10% of those required is suggested) in case the number of participants changes slightly during the survey period.

11. If running the survey online, obtain the unique survey internet address from the WEST

Running the survey

12. Run survey briefing sessions with the workforce

See "Running a survey completion session briefing notes" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

Ensure that these sessions provide enough time to cover any questions about how to complete the survey, as well as time to complete the survey itself. Thirty minutes is typically enough time for these sessions.

Note that survey briefing sessions are not required on all worksites – the surveys may be distributed in hard copy or online for workers to complete at a suitable time. However, enough time during a working shift should be made available for workers to complete the survey. It should not be left for workers to complete the survey during their non-working time.

13. Monitor attitudes to the survey and be prepared to answer any questions about the survey, even difficult ones

At many worksites, it is possible to gauge the collective attitude (or attitude of particular groups) towards initiatives such as the Workforce Engagement survey. This can be helpful to understand if the key messages about the survey have been communicated effectively.

If negative attitudes towards the survey are apparent, it can be helpful to directly address questions such as:

- What's in it for me?
- How do I know the process is confidential?
- Will anything happen with the results?

14. If running the survey in hard-copy, collect the responses from the hard-copy response box and ship these to Step Change in Safety at least every two weeks

Shipments need to be logged on the WEST to ensure that they are tracked and received by Step Change in Safety.

15. Give frequent updates on the response rate and announce the closure of the survey from two weeks before the closing date

The response rate is available from the WEST – check this before communicating how much of the workforce has responded to the survey. Make sure you cite the industry average response rate to create a sense of awareness of how many people are participating on the worksite in comparison to others in industry.

Announcing the closure of the survey provides the opportunity for a final 'push' on survey responses. Indicate that people may miss out on their opportunity to share their views if they do not respond to the survey by the close date.

16. Thank everyone for participating in the survey and commit to a time for feeding back the results

Communicate the final response rate and announce when the results will be fed back. Commit to a date to feedback the survey results and develop an improvement plan. Make sure this commitment is met.

Downloading and feeding back the results

17. Download the survey results from the WEST

See: "Accessing your survey results and focussing on key messages in the survey data" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

18. Review the survey results and discuss them with key groups

It can be helpful to review and discuss the survey results with key groups (such as senior leaders and safety reps) prior to feeding back the results to the whole workforce.

The purpose of this review and discussion is to familiarise these key groups with the results to ensure they can help others in the workforce understand them. The purpose is not to 'filter' or 'frame' the results in any particular way.

19. Feedback the survey results to the workforce

Organise briefing sessions to feed the results back to the workforce. It can be helpful to organise large, specific briefing session that are attended by senior managers / site leaders in which the overall results are presented. Enough briefing sessions should be planned to ensure all groups who participated in the survey get the chance to attend.

The briefing should clearly communicate how 'mature' the results suggest the worksite is on each dimension of the Workforce Engagement maturity framework. In addition, key strengths and areas for improvement should be clearly presented.

It is important that the purpose of the Workforce Engagement survey is not lost amidst the many figures and statistics available within the survey results reports. To ensure this doesn't happen, a simple summary of the survey results should be prepared. This summary needs to be in the language and style of the workplace and include clear details about:

- How engaged in safety people are,
- The strengths and areas for improvement in Workforce Engagement, and
- The impact of improvements that have been made (if applicable).

After the results have been presented, the workforce should be asked if the results 'feel right'. This step – 'sense-checking' the results – is an important step in ensuring that they survey process is seen to be open, honest and trustworthy.

20. Involve the workforce in identifying improvement areas and deciding how to improve

See: "Engaging the workforce in simple and effective action planning" from Step Change in Safety. Go to www.stepchangeinsafety.net for more information.

Your checklist for completing the Workforce Engagement survey at your worksite

Step	Activity	Complete?
1	Ensure senior leadership understanding of Workforce Engagement and the Workforce Engagement survey	
2	Appoint a worksite administrator for the Workforce Engagement Survey Tool (WEST)	
3	Decide which groups will be included	
4	Decide on the timing of the survey	
5	Decide on how you want to run the survey – online or hard copy	
6	Log in to the WEST to go through the registration process and initiate your survey:	
7	Understand how to communicate about the survey	
8	Make efforts to engage key groups early in the survey process	
9	Communicate about the survey	
10	Print the required number of survey booklets using the unique survey file created from the WEST	
11	Obtain the unique survey internet address from the WEST	
12	Run survey briefing sessions with the workforce	
13	Monitor attitudes to the survey	
14	Collect the responses from the hard-copy response box and ship these to Step Change in Safety	
15	Give frequent updates and announce closure of the survey	
16	Thank everyone for participating and commit to a time for feedback	
17	Download the survey results from the WEST	
18	Review the survey results and discuss them with key groups	
19	Feedback the survey results to the workforce	
20	Involve the workforce to identify improvement areas and decide how to improve	

Remember! Surveys are just the beginning of meaningful improvement of Workforce Engagement. An on-going cycle of dialogue and action is required.

Now make the required changes at the worksite!